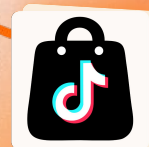
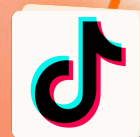


The Beauty Trends That Took Shape on TikTok Shop in 2025



February 12th, 2026





Introduction to Charm.io: AI Platform for eCommerce Data Intelligence

Brand Performance & Social Discovery Data that Enables Brands, Retailers & Investors to Discover, Analyze, & Compete





The Top TikTok Shop Subcategories in Beauty & Personal Care

Skincare & Makeup Dominate with Sales & Views

	GMV	Video Views
Skincare	\$596M (+126% YoY)	26B (+290% YoY)
Makeup	\$562M (+73% YoY)	32B (+238% YoY)
Fragrance	\$400M (+111% YoY)	14B (+315% YoY)
Personal Care Appliances	\$331M (-2% YoY)	20B (+127% YoY)
Haircare & Styling	\$289M (+116 YoY)	17B (+402 YoY)
Bath & Body Care	\$262M (+82% YoY)	12B (+265% YoY)
Nasal & Oral Care	\$109M (+56% YoY)	12B (+423% YoY)
Hand, Foot & Nail Care	\$109M (+130% YoY)	8B (+364% YoY)
Men's Care	\$32M (+271% YoY)	2B (+813% YoY)
Eye & Ear Care	\$22M (+174% YoY)	2B (+669% YoY)
Feminine Care	\$18M (+240% YoY)	1B (+1,008% YoY)
Special Personal Care	\$5M (+349% YoY)	282M (+560% YoY)

Data from Jan. 2025 - Dec. 2025. U.S. Beauty Subcategory GMV & Video Views.

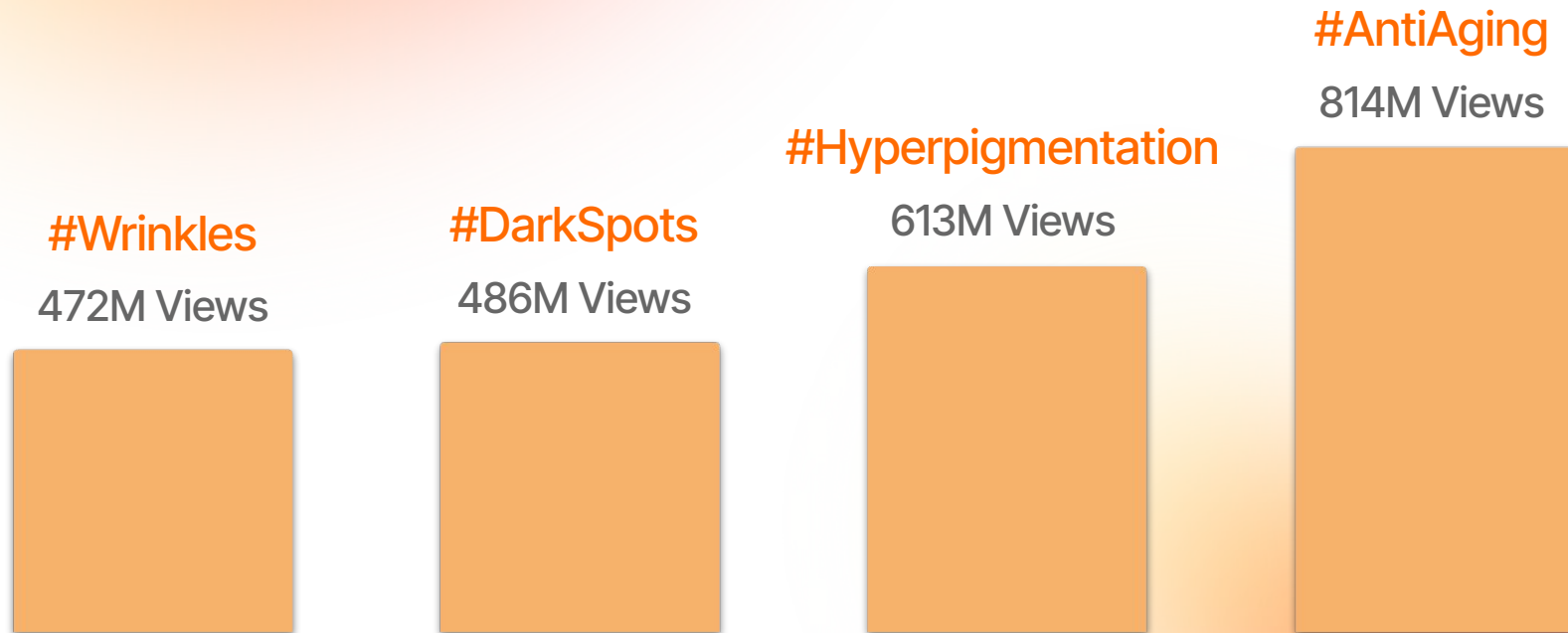


Skincare Trends



Benefits For Specific Skin Conditions Are Most Frequently Promoted

Creators are Speaking to Looking Young & How to Use Products for Specific Conditions

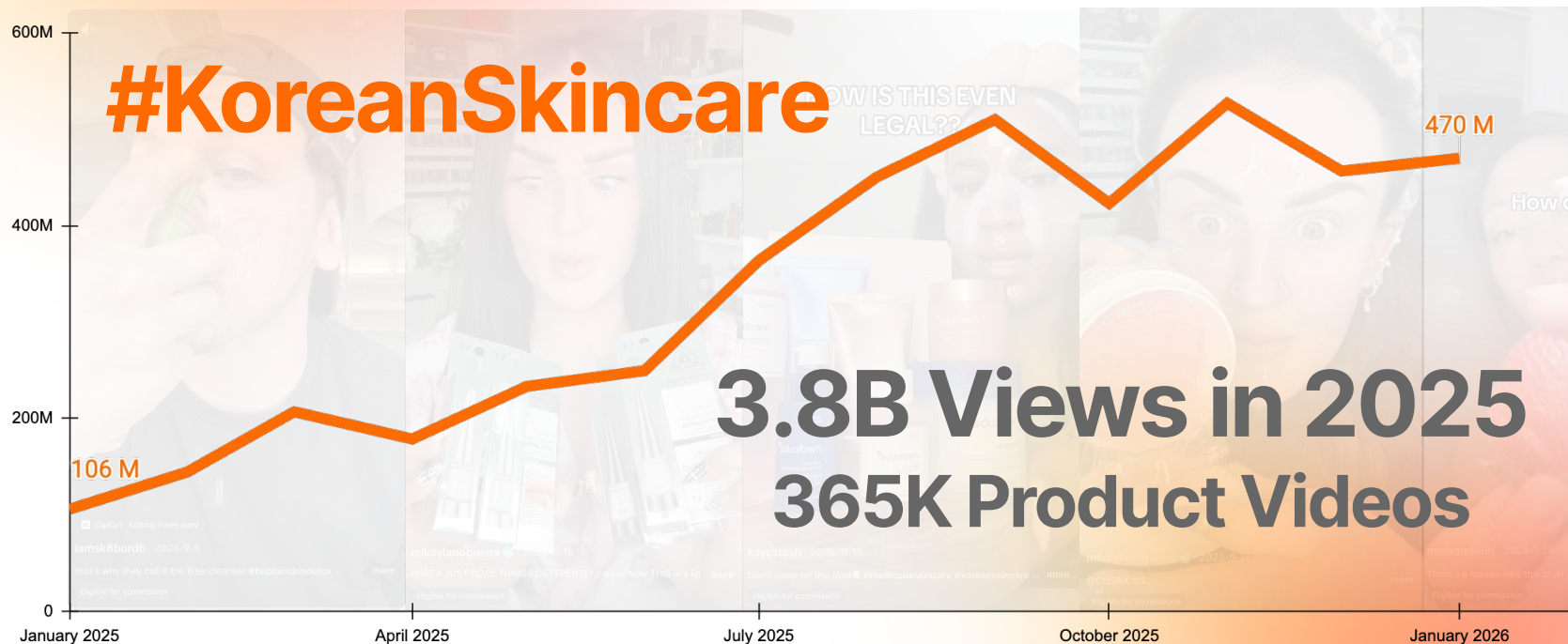


Data from Jan. 2025 - Dec. 2025. U.S. Skincare Subcategory Hashtag Views.



Korean Skincare Shows No Signs of Slowing Down

The Top Skincare Trend of 2025: January Video Views +343% Year-Over-Year



Jan. 2025 - Jan. 2026. U.S. Beauty & Personal Care Hashtag Video Views.



Four Out of Five of the Top Skincare Shops Are Korean Skincare Brands

Consumer Interest in the Trend is Driving Real Purchasing Behaviors

medicube⁺

\$93.5M

Dr.Melaxin

\$56.0M

Anua

\$24.8M

JYU

\$12.1M

TRULY

\$11.8M

Data from Jan. 2025 - Dec. 2025. U.S. Skincare Subcategory TikTok Shop Sales.



Skincare Bundles Dominated Sales

Complete Routines Drive Higher Perceived Value for Consumers & Better Economics for Brands

\$28.1 M



Medicube
Gentle Skin
Glow Routine

\$22.6 M



Dr. Melaxin
Peel Shot Glow
Rice Ampoule Duo

\$10.8 M



EVIL GOODS!
Whipped Tallow
Honey Balm

\$8.8 M



Medicube
Glass Glow
Skincare Set

\$8.1 M



Terra Lotus
Tallow
Honey Balm

Data from Jan. 2025 - Dec. 2025. U.S. Skincare Subcategory Top TikTok Shop Product Sales.



Makeup Trends



Tarte Continued to Dominate Makeup Category on TikTok Shop in 2025

Driving More GMV than the Next Six Shops Combined!



Data from Jan. 2025 - Dec. 2025. U.S. Makeup Subcategory



The "Natural" Effects of Tarte's Products is Resonating with Consumers

Tarte's Top Selling SKUs Emphasize Correcting "Tired, Puffy Skin"

Tarte

Colored Clay CC
Undereye Corrector



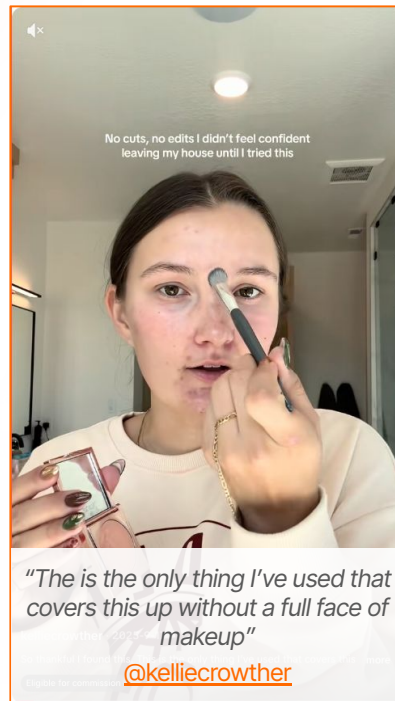
\$15.6M

Tarte

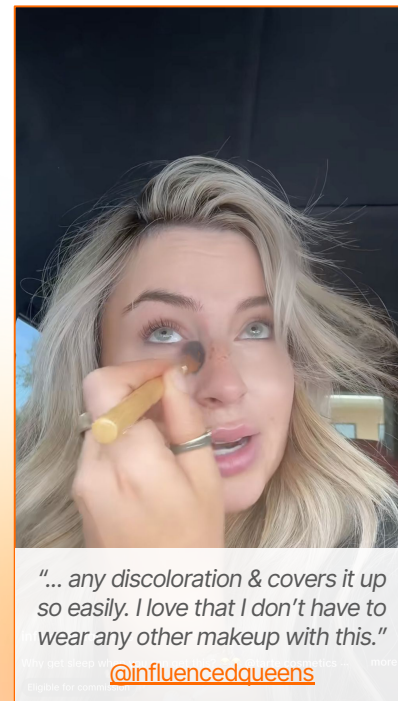
Concealer
Paw Brush



\$13.2M



[Video Link](#)



[Video Link](#)



Shoppers are Leveraging DIY Makeup Solutions Highlighting Lips & Lashes

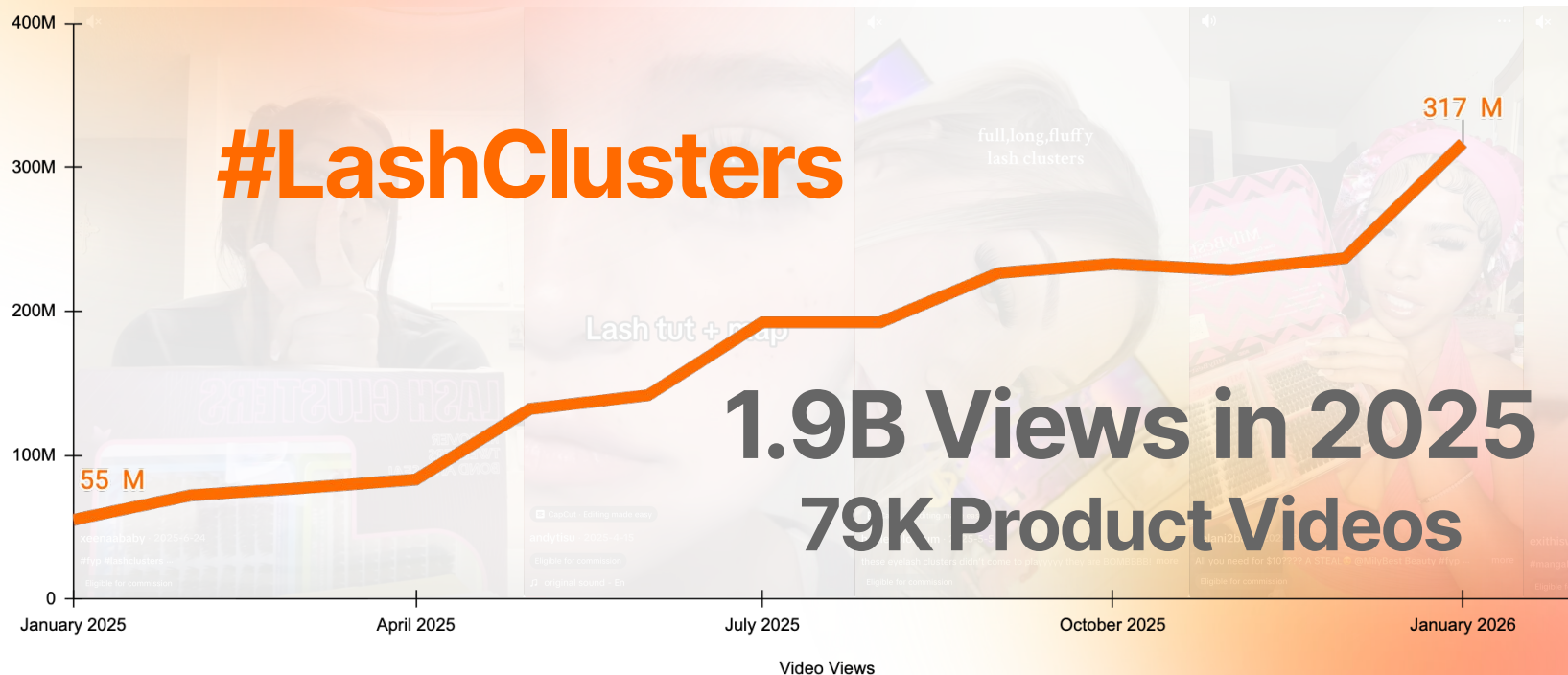
Consumers are Leaning Into Professional Looks They Can Achieve at Home (at an Affordable Price)

Hashtag	Video Views	GMV		Top Product
#LashClusters	1.9B	\$17.7M		YOU LUCK DIY Lash Cluster Kit
#LipStain	1.6B	\$15.5M		Sacheu Lip Liner STAY-N Peel-Off Lip Stain
#LipCombo	1.3B	\$15.4M		Sacheu Lip Liner STAY-N Peel-Off Lip Stain
#MakeupTutorial	943M	\$14.4M		Tarte Sculpt Tape & Blush Duo
#MakeupHacks	700M	\$10.6M		Tarte CC Undereye Corrector



#LashClusters are Having a Moment... and it's Not Fading

January Video Views +475% Year-Over-Year → Consumers Value the Balance of Results & Affordability



Views from Jan. 2025 - Dec. 2025. U.S. Beauty & Personal Care Category



Fragrance Trends



Top Shops Within Fragrance are Third Party Sellers - Not Brands

Even Established Brands See Resellers as a Key Distribution Channel the Fragrance Category on TikTok Shop

BELLAVITA

\$28.3M



\$22.8M



\$21.5M



\$17.6M



\$16.3M

Data from Jan. 2025 - Dec. 2025. U.S. Fragrance Subcategory



Gourmand Scents are Taking over Fragrance

Warm, Sweet & Comforting Aromas Such as Vanilla, Marshmallow & Honey are Gaining Traction

*Vanilla, Salted Caramel,
Sandalwood*



Stttes
02# Irresistible Sunshine

\$8.4M

*Honey, Bergamot,
Vanilla*



Bella Vita
Honey Oud

\$6.6M

*Citrus, Wood,
Musk*



YCZ
Midnight Marine

\$5.0M

*Marshmallow,
Sugar, Vanilla*



Shams Al Emarat Khususi
Pink Blush

\$3.9M

*Vanilla, Sandalwood,
Agarwood*



PHLUR
Vanilla & Cream Duo

\$3.5M



The Top-Selling Fragrance Product is a Dupe for Sol de Janeiro

Sttes "02#" Generated >\$8.4M in Sales in 2025, Highlighting Shopper's Choice of Value & Affordability Over Brand

Sttes
02# Irresistible Sunshine

\$18.20
Avg. Unit Price

— DUPE FOR —
Sol de Janeiro
Brazilian Crush
Cheirosa

\$39.00
soldejaneiro.com

“Smells sooooo good...but lasts a million times longer and projects”
[@leahkenyon5](#)

[Video Link](#)



This Kayali Dupe is the 4th Top Seller at 73% Off the Original Brand's Price

Shoppers Looking for "Affordable Luxury" + Long Lasting Scent Benefits

Shams Al Emarat Khususi Pink Blush

\$28.12

Avg. Unit Price



— DUPE FOR —

Kayali

Yum Boujee
Marshmallow



\$105.00

sephora.com



"It literally smells so good and lasts so much longer...
It's an exact dupe for the KAYALI one"

[@jadeenvermee](#)

[Video Link](#)



Dossier's 'Ambery Saffron' - Another Dupe - Drove \$2.6M in Sales

89% Cheaper than the Maison Francis Kurkdjian Original

Dossier Ambery Saffron

\$39.73
Avg. Unit Price



— DUPE FOR —
Maison Francis Kurkdjian
Baccarat Rouge 540



\$355.00
franciskurkdjian.com



dan "They smell almost the same for a
fraction of the price."
Hugoboss east indian
dan translation
English for comparison @danyanoemi

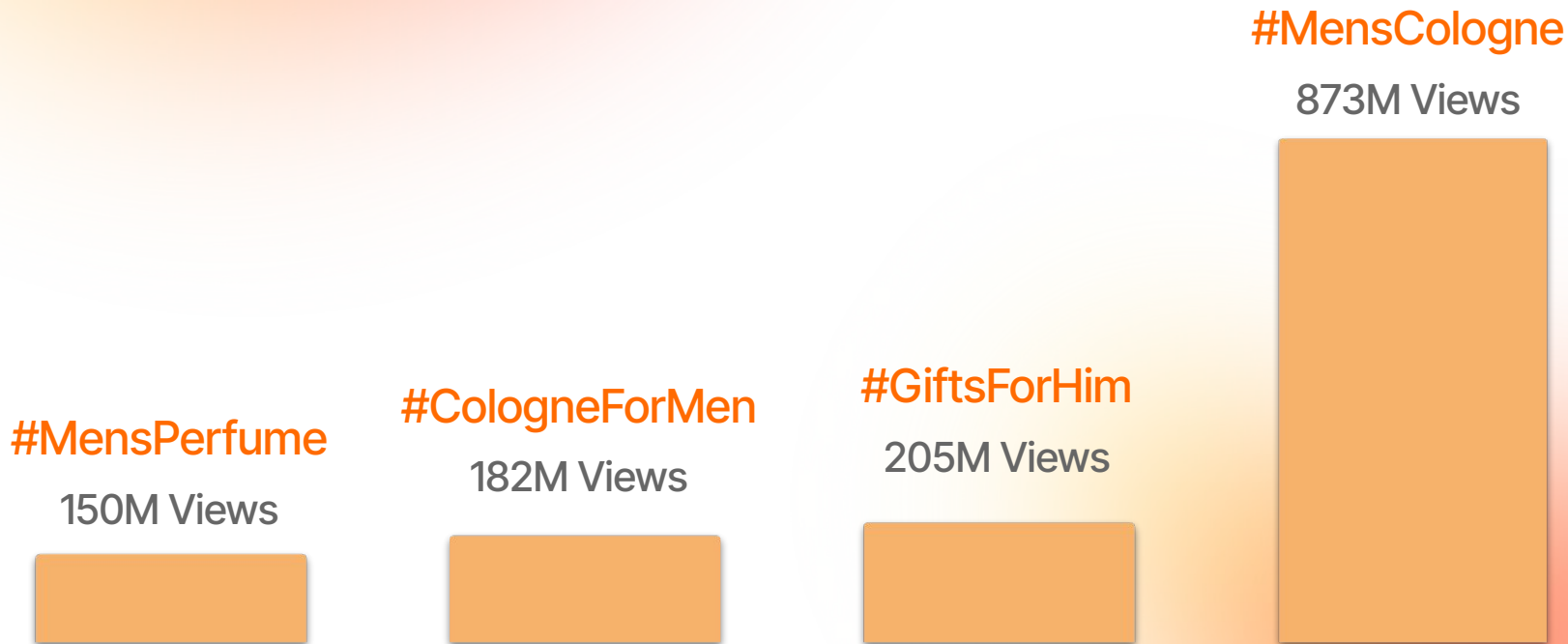
[Video Link](#)

Data from Jan. 2025 - Dec. 2025. U.S. Fragrance Subcategory.



Men's Fragrances are Trending, Supported by Gifting

Men's Rising Adoption of Personal Care is Expanding into Fragrance



Data from Jan. 2025 - Dec. 2025. U.S. Fragrance Subcategory



Key Takeaways



Align Your Positioning & Product Offerings with Trends in 2026

Leverage Data & Trends from Top Performers to Derive Insights for Your Own Content & Product Strategies

Solutionize Against Specific Concerns with Product Bundles



Your customers are looking for a one-stop-shop solution for their specific needs, at a good value.

Educate Your Audience With DIY Tips for Best Results



Create "demo-able" content to show #makeuptutorials and how consumers can achieve desired looks at home.

Consumers Are Not Ashamed of Looking for "Affordable Luxury"



Lean into marketing the affordability of your products - especially if they come with other benefits vs. higher price competitors.

alex@charm.io

www.charm.io



Thank You

Please get in touch with any questions.



Book a Demo of Charm.io